

# The Proliferation of Brands: The Case of Food in Belgium, 1890–1940

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Nowadays, brands are inescapable. Economists and marketing experts trace this pervasive presence back to the 1980s when brands and branding seemed to promise new, crucial assets for both producers and consumers.<sup>1</sup> Of course, brands existed much earlier, and although some authors claim that “brands are as old as known civilization,”<sup>2</sup> most researchers accept that they burgeoned with the coming of large consumer-goods-oriented factories in the 1870s, generating the “first golden era for the modern brand mark” in the 1890s.<sup>3</sup> The recent success of brands has stimulated historians’ attention to product variety, advertisements, brand management, firms’ and products’ reputations, consumer loyalty, the significance of brands, and much more.<sup>4</sup> This is not to say that such themes were hardly being investigated before 1990, since several studies point to the

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1. For example, Riezebos, *Brand Management*, xi.

2. Moore and Reid, “Birth of Brand,” 419. The discussion is tackled by Duguid, “Developing the Brand.”

3. Moor, *Rise of Brands*, 18; Moore and Reid, “Birth of Brand,” 429.

4. Jones, “Brands and Marketing,” 2–5; Koehn, *Brand New*, 1; Moor, *Rise of Brands*, 3.

contrary,<sup>5</sup> but since that date the importance of brands for economic (business) and social (consumption) history has been clearly acknowledged.<sup>6</sup>

Most historical literature about brands focuses on single firms,<sup>7</sup> and deals with the conditions for the brand's diffusion, the advantages for producers and retailers, and the reception by consumers. Thus, changes in urbanization, industrialization, communication, employment, business organization, purchasing power, retailing, cultural prospects, gender relations, psychological motivations, and so forth have been indicated as factors in the interpretation of their growing importance.<sup>8</sup> As for producers' benefits, increased control over sales and prices and, hence, profits is cited, alongside a clear market position, product familiarity, and appeal.<sup>9</sup> The retailers' advantage in supplying branded products included exclusive sales rights, clear and direct understanding of consumers' wishes, and equally clear and direct interaction with producers and importers, which would lead to greater control of sales, prices, and profits.<sup>10</sup> As for consumers, historians claim that brands offered clear, recognizable, and reliable products (in terms of weight and quality), which were for sale virtually everywhere; brands, moreover, may add meaning to goods, sometimes leading to a special relationship between buyer and product.<sup>11</sup> Despite the success of brands, however, their wide acceptance encountered resistance, caused by the antagonism between producers and retailers with regard to price levels, and by the loss of direct interaction that had existed between customers and retailers.<sup>12</sup> It took producers great efforts (including premiums, advertisements, and special offers) to win over consumers.

Our starting point differs from the above approaches. We do not consider the history of specific brands to which history writing has

5. For example, Braznell, *California's Finest*; Eastley, *The Singer Saga*; Jones, "Multinational Chocolate"; Oliver, *The Real Coke*.

6. This is adequately illustrated by Church, "New perspectives," endorsing interest in the "common hinterland" of business and consumer history, that is, marketing history.

7. As noted by da Silva Lopez and Casson, "Entrepreneurship," 651.

8. Low and Fullerton, "Brands, Brand Management"; Moor, *Rise of Brands*, 18–19.

9. Wilkins, "When and Why Brand Names," 18–19; Jones and Slater, *What's in a Name*, 31–2.

10. Koehn, *Brand New*, 124–129; Williams, "Multiple Retailing and Brand Image".

11. Wilkins, "When and Why Brand Names," 19–20; Jones and Slater, *What's in a Name*, 32. On the (present-day) relationship between consumers and brands, with the emergence of particular notions such as "lovemarks," "voicy consumers," "co-creation of value," see Foster, "The Work of the New Economy," and Paterson, *Consumption and Everyday Life*, Chapter 8.

12. Law and Fullerton, "Brands, Brand Management," 176–7; Deutsch, *Building a Housewife's Paradise*, 67–70.

recently been largely directed,<sup>13</sup> but we shall investigate the actual increase in choices and the actual distribution of branded goods. We shall deal with the growth in the numbers of products and brands available in grocery stores, because the majority of consumers encountered brand names not in luxury consumer sectors such as perfume or automobiles, but rather in everyday purchases of food that, between 1850 and 1950, typically accounted for at least 50 percent of the total spending of an industrialized-nation household. “Food was one of the first commodities encompassed by a burgeoning systems of mass distribution,” Tracey Deutsch notes.<sup>14</sup> We argue that knowledge about the development of product variety, and distribution of brands between the 1860s and 1930s is crucial to understanding the consumer society that consolidated in this period.<sup>15</sup> All too often studying the emergence of modern consumer cultures has focused on the “spectacular and dream-like aspects of consumerism,” embodied by the department store.<sup>16</sup> By exploring the diffusion of brands in the grocery trade, we deal with “the more mundane processes through which consumerism [became] entrenched.”<sup>17</sup> Shopping for groceries changed with the proliferation of brands: customers were now able to buy individual standardized packages of branded food items instead of portions of a bulk product, weighed and packaged by the retailer who provided at best some information on the product’s origin.<sup>18</sup> With a name, a logo and a package distinguishing similar products from one another, the branded product could develop into an item invested with values and emotions.<sup>19</sup> It also contributed to the convenience of food preparation, since manufactured products such as sauces and canned fish, fruit or vegetables enabled the home cook to save time.

Previous research on brands in food and drinks has addressed big issues in business and consumption history, including the question of the chronology of the diffusion of brands and of the benefits for firms and consumers.<sup>20</sup> We shall touch upon such broad topics, but we prefer to focus on questions about the precise rhythm of product

13. For example, Pendergrast, *For God, Country and Coca-Cola*; Church and Clark, “Product Development”; Marty, *Perrier, c’est nous*; Bradley, *Cadbury’s Purple Reign*; Lonier, “Alchemy in Eden,” which all consider successful examples.

14. Deutsch, *Building a Housewife’s Paradise*, 18.

15. Humphery, *Shelf Life*, 26.

16. Ibid; 25.

17. Ibid; 26.

18. Moor, *Rise of Brands*, 17–18.

19. Humphery, *Shelf Life*, 33.

20. For the former, see Duguid, “Developing the Brand,” for the latter, see Casson, “Brands,” 41–2 and 50–3, who criticized the dominant (and according to him, oversimplified and misleading) view that branding is socially beneficial.

innovation, the actual development of product range,<sup>21</sup> and the success and variety of brands. Although we know that brands appeared quite early in food sales, as illustrated by Twining (1706) or Douwe Egberts (1753), and grew swiftly in the nineteenth century, as shown by very successful manufacturers such as Knorr (1838) or Heinz (1869), we have no sense of the pace and the extent to which branded products replaced the anonymous bulk products on the grocery shelves. To the best of our knowledge, detailed research into the evolution of the range and branding of consumer goods has never been conducted.<sup>22</sup> Our aim is to arrive at a better understanding of consumer society with its inherent tendency to increasing product diversification, in which brands play a central part.

We limited our research to Belgium between 1890 and 1940. The country had an open economy, was densely populated and urbanized, had a dense transport system that facilitated a homogeneous market for goods and labor, had gone through processes of industrialization, possessed modern retailers, and by 1914 ranked third in terms of Gross Domestic Product per capita in Europe, after UK and Switzerland.<sup>23</sup> These characteristics are generally viewed as conditions for the smooth spread of brands. This study has a wider interest in that it inevitably deals with international market processes. Moreover, we explore the diffusion of brands in two firms representing the most dynamic forms of retail organization of the period 1880–1940: chain stores and cooperatives.<sup>24</sup> Around 1930, Belgium belonged to the group of European countries (including Germany, UK, The Netherlands, Ireland, and Denmark) where both cooperatives and chain stores were well-developed, compared to European countries where (one of) these types of retail organizations lagged behind.<sup>25</sup> The investigation's temporal boundaries are prompted by the assumption that brands spread from the 1880s on and were familiar by 1940. A final reason to focus on Belgium is quite pragmatic: the study of the effective distribution of brands in grocery shops must necessarily be limited to

21. Most historical periods of economic growth have been connected to an “expanding range of consumer goods,” as illustrated by the work by, for example, Stobart, *The First Industrial Region*, 48 (the first half of the eighteenth century); Stearns, *Consumerism in World History*, 51 (the 1900s); or Hilton, “Consumer Politics,” 248 (the 1950s).

22. Alden Manchester (*Rearranging the Economic Landscape*) studied the share of manufactured foods sold to retailers in the United States, classified by unbranded, manufacturer brand, and retailer brand. The assortment of foodstuffs in present-day supermarkets is regularly studied, see for example, Jekanowski and Binkley, “Food Purchase Diversity.”

23. Maddison, *The World Economy*, 185; see too Van der Wee and Blomme, *The Economic Development of Belgium*.

24. Stobart, *Spend*, 133–43.

25. Urwick and Valentine, *Trends in the Organization*, 85–6.

a particular area and period. Moreover, it requires source material that can tell us about the most banal and seemingly self-evident aspect of retailing: the range of products for sale. Perhaps that is one of the reasons why so few retailers' price lists, a major source of information on the range of goods, have been preserved and explored. For the grocery trade in particular, these might have little interest: a catalog of cars or harvesting machines is undoubtedly more impressive than a list of brands of canned peas. We argue, however, that the history of consumerism has to be investigated in all its aspects, including the most prosaic. Being able to choose among five different brands of canned peas, further subdivided by weight, was part of the transformation of daily life. For Delhaize, by 1914 the biggest food multiple in Belgium, and Union Economique (U.E.), by 1914 one of the biggest consumer cooperatives in the Brussels conurbation, such price lists were produced at regular intervals and have survived.

Trade catalogs have been labeled "an outstanding social document" and "a metaphor for the industrial age," taking the Sears catalogs from around 1900 as a case in point,<sup>26</sup> for they contain not only the full list of goods for sale but also advertisements, the retailer's policy, recommendations for shoppers and sellers, appeals to purchase goods by post, and much more textual and iconographic information. These catalogs are therefore much more than a simple enumeration of goods and their prices: they contribute to the history of the firm, the consumer, advertisements, and consumption. At the eve of the First World War, a French observer claimed catalogs "diffused temptation in the countryside."<sup>27</sup>

Price lists will not only allow us to study the growth of choice and the proliferation of brands but also enable us to determine whether brands were more popular in a multiple/chain store than in a cooperative grocer's. Both retailers benefited from economies of scale through bulk buying, but as opposed to chain stores, cooperative retail societies were "democratically run, collectively owned, private enterprises," returning a share of their profits as a dividend to their members, also known for their critical attitude toward the temptations of consumerism and the creation of "false needs."<sup>28</sup> Did the cooperative U.E. therefore stock fewer manufacturers' branded products (or proprietary brands)<sup>29</sup> than the multiple grocer Delhaize?

26. Leiss, Kline, and Jhally, *Social Communication in Advertising*, 71–2; Sears sold a wide range of products, among which groceries (see the reprint of the 1897 *Sears Roebuck & Co. Catalogue*).

27. Furlough, "French Consumer Cooperation," 176.

28. Furlough and Strikwerda, "Consumption, Economics and Gender," 27, 40.

29. Williams, "Multiple Retailing," 292.

The price lists will also enable us to investigate whether the multiple grocer and the cooperative tried to counter the impact of branded goods by launching brands carrying their own name (i.e., private labels). Manufacturers of branded items aspired to sell their products at fixed prices, either by promoting a system of resale price maintenance (RPM) as in Great Britain<sup>30</sup> or by pressuring retailers as in Belgium, resulting in a greater substantial price rigidity.<sup>31</sup> Although opinions differ regarding the impact of RPM on price competition,<sup>32</sup> there seems to be no disagreement that it did encourage multiple retailers to develop their own lines.<sup>33</sup> Moreover, from the 1980s on, a “shift in power from manufacturers to retailers” occurred because the latter became “super brands in their own right.” Their private labels could compete with manufacturers’ brands both in price and quality.<sup>34</sup> However, we have hardly any systematic information on the early history of multiple retailers’ private labels. Observations are limited to mentioning the existence of own brands,<sup>35</sup> general descriptions of relations between manufacturers and chain stores,<sup>36</sup> or more anecdotal information on the history of a multiple’s private label.<sup>37</sup> With regard to cooperative grocers, research has emphasized the cooperative’s own produce, but whether the cooperatives’ shelves were mostly stocked with products carrying the cooperative label has not been established.<sup>38</sup>

### Delhaize, U.E., and Their Brands

Food multiples emerged in Belgium in the 1860s, and by 1914 several such chains appeared throughout the country. By far, the most flourishing was Delhaize Frères & Compagnie Le Lion.<sup>39</sup> This firm

30. Jefferys, *Retail Trading*, 174.

31. In Belgium, the price of branded groceries decreased by 21.9 percent compared to 36.9 percent for unbranded items between 1929 and 1935, see Vander Gucht, “Les tendances actuelles,” 296.

32. Pennance and Yamey, “Competition in the Retail Grocery Trade,” 314–16, claim that RPM was not very effective.

33. Williams, “Multiple Retailing,” 300–01.

34. Miller, *The Dialectics*, 163; Miskell, “Unilever’s (Other) Brands,” 220–4; Howe, “Vertical Market Relations.”

35. For example, the French multiple Casino started business in 1898, produced its own chocolate, pasta, biscuits, coffee, etc., and deposed the trademark “Casino” in 1901; *Casino cent ans*, 40–3. Prior to 1914, many cooperatives set up factories in order to be able to reduce costs and sold goods under own brands; Furlough and Strikwerda, “Economics, Consumer Culture and Gender,” 31 and 35.

36. Beltran, Chauveau, and Galvez-Behar, *Des brevets et des marques*, 188.

37. For example, Williams, *Best butter*.

38. Schwarzkopf, “Innovation, Modernization, Consumerism.”

39. Collet, *Delhaize Le Lion*, and Van den Eeckhout and Scholliers, “Strategy of a Belgian Multiple Grocer.”

was established in 1867 in the (industrial) province of Hainault. It moved to Brussels a few years later, and prior to 1914 had stores all over Belgium in big cities, as well as in remote and small villages, thus achieving nationwide coverage. Its points of sale expanded sensationally from 21 in 1875 to 744 by 1914. In 1930, Delhaize's shops had decreased to 680, but its products could also be bought at 262 *dépositaires* (independent shops that carried a limited number of Delhaize products), 883 *clients libres*, and 77 *clients divers*, such as hotels, cafés, restaurants, railway stations, and school cafeterias. In 1937, the number of regular Delhaize shops rose to 1,137, including 140 in the Brussels conurbation. Starting with a limited range of goods (colonial wares, wine, and liquor), Delhaize aimed continuously at enlarging its supply, but, prior to 1940, never sold bread or fresh meat, and only started selling fresh fruit and vegetables in the 1930s. Alongside food and alcoholic drinks, Delhaize offered soap, paint, perfume, tobacco, and cleaning products. However, foodstuffs were by far the most important in terms of sales, and Delhaize often represented itself as a trader in *denrées alimentaires*. The store set up a retailing system that involved rapid delivery from the Brussels central warehouse; goods could be ordered via a catalog distributed to store managers who, moreover, received a weekly update of product types and prices (alongside guidelines with regard to window display, goods to be promoted, or advertisements). Two authoritative contemporary observers judged that Delhaize served mainly the working classes, but its diversified product range, supply of luxury goods, emphasis on courtesy toward the clientele, provision of home delivery, and selective credit facilities suggest a chain store with a middle-class clientele as well. Delhaize aimed at reaching all consumers, working and middle class, urban and rural.<sup>40</sup>

As it was the case with most chain stores in Europe and the United States, Delhaize cut costs by eliminating intermediaries and buying directly from producers, or by manufacturing its own merchandise. Delhaize pursued this option with great zeal until the 1920s. The 1875 price list announced that the firm roasted its own coffee and that it possessed a mechanical installation for grinding sugar. Subsequent price lists were prompt in announcing new factories, and in 1914 Delhaize had a total of twenty-three facilities, which means that between 1875 and 1914 the firm had set up a new manufacturing plant every twenty months. By then, the company possessed factories for coffee roasting, sugar processing, and the making of soap, soda, brushes, liquor, chocolate, biscuits, gingerbread, candy, smoked ham,

40. Van den Eeckhout and Scholliers, "Strategy of a Belgian Multiple Grocer."



ground spices, sponges, tapioca, tobacco, perfume, shoe polish, mustard, vinegar, carpets, and paint (as well as a print shop). By 1913, the total sales of the Delhaize factories reached 5.8 million Belgian francs, 46 percent of which was realized by coffee.<sup>41</sup> The importance of coffee production declined in the interwar years, but that of biscuits and, to a lesser extent chocolate, grew. All Delhaize products were advertised and sold under the firm's own brand (which was officially registered). Obviously, this aim to vertically integrate production and distribution had a direct influence on the presence of the firm's own brand in Delhaize's price list, as we shall see.

Delhaize's industrial activities suffered from the First World War. In 1929/1930, the factories' sales were 32 percent lower than in 1913/1914 (in constant prices), and in the next decade this declined still further.<sup>42</sup> The 1938/1939 report of the *Conseil d'administration* mentioned that the enterprise would no longer produce its own chocolate and confectionery. It was considered more profitable to have another manufacturer create articles under the Delhaize brand than to modernize its factory.<sup>43</sup> It is likely that Delhaize subcontracted the production of more than chocolate and confectionery, and did so prior to 1938. The number of its own brand products grew between 1914 and 1923 and, again, between 1930 and 1933, in contrast to Delhaize's factories' declining output.

In 1913, Delhaize reached total annual sales of 23 million francs, and by 1939 this had risen to 231.6 million francs (in constant values a growth by 0.9 percent per year). Also in 1913, the *Société Coopérative L'Union Economique de Bruxelles* had annual sales of 5.6 million francs. These lower sales reflect the fact that U.E. limited itself to the Brussels conurbation. In 1939, U.E.'s total sales were 186.0 million francs. In constant value (of 1936/1938), these figures were the equivalent of 40.8 and 175.8 million francs, respectively, a growth rate of 5.7 percent per year since 1913. The U.E.'s faster growth took place because the cooperative was gradually expanding its product range to nonfood products such as stoves, washing machines, hats, and clothes, appreciably more expensive items. As a result, the average sum spent per U.E. customer was higher than at Delhaize. In

41. Archives Delhaize, Rapport sur les diverses opérations des usines pendant le 15e exercice social 1921/1922.

42. Van den Eeckhout and Scholliers, "Strategy of a Belgian Multiple Grocer."

43. Archives Delhaize, Rapport du conseil d'administration. Exercice 1938/1939, 31. Competition in chocolate production had been harsh since 1920, when famous Belgian producers (*Côte d'Or*, *Jacques*, *Victoria* et cetera) were focusing more on the local market due to increased international competition, price disadvantage and instable exchange rates.



1930, for example, U.E. customers spent 3,300 francs per year, while Delhaize clients spent only 1,070 francs.<sup>44</sup>

U.E. started in 1888 as a neutral (i.e., nonpolitical) consumer cooperative for personnel of the Belgian state railroad and postal services. By 1910, all civil servants living in the Brussels conurbation, whether employed by ministries, local administration, or the army, could become co-op members, which led to a rapid increase in enrollments. From 2,500 individuals in the 1890s, the membership grew to 6,500 in 1910, 18,700 in 1920, and a staggering 75,000 by 1939.<sup>45</sup> In comparison, the cooperative grocer Welvaart (a joint venture of the Christian labor and farmers' organizations), which had 813 shops spread all over the country, counted 56,383 members and 8,800 nonmember customers in 1935.<sup>46</sup> The socialist consumer cooperatives were the largest, though: in 1938/1939 they had 305,000 members and 1,139 branches.<sup>47</sup> U.E.'s urban clientele benefited from fairly secure employment, albeit with huge income differentials due to very different job statuses (from unskilled workers to top civil servants). In 1946, the economist F. Baudhuin characterized U.E. as a store with a clientele of civil servants and Brussels bourgeoisie.<sup>48</sup>

U.E., however, had all the elements of a classic consumer cooperative, often mentioned in its *Bulletin Mensuel* ("Monthly bulletin"): references to the Rochdale pioneers, membership fees, cash payments, fair trade, profit sharing, and democratic functioning.<sup>49</sup> One consequence of U.E.'s legal status was that members were well-informed about the enterprise's general state of affairs (via the *Bulletin*) and were supposed to be present at the annual general meeting. Right from the start in 1888, the supply of the "prime necessities of life," that is, food and clothing, defined the cooperative's baseline, aiming at decent quality for a fair price. By 1900, U.E. was selling groceries, bread, fresh meat and poultry, salted meats, dairy products, fruit and vegetables, wine, beer, and tobacco, as well as

44. Archives Delhaize, Rapport au Conseil d'administration, 1934–1935, "Pouvoir d'achat: total des ventes divisé par le nombre de bulletin d'achats," 1; "Résultats généraux," *Bulletin Mensuel*, 15 October 1939, 3. U.E.'s average sales per customer have been calculated since 1890. In fixed value (of 1936/8), this rose from 800 francs in 1890, to 2,700 in 1910, 1,700 in 1920 (influence of the Great War), 2,760 in 1930, and 2,300 in 1939.

45. "Résultats généraux," *Bulletin Mensuel*, 15 October 1939, 3.

46. Archives Welvaart. Verslag dienstjaar 1934/35, opgesteld op 18 januari 1936. Unfortunately, this grocer's archives do not contain price lists.

47. Strikwerda, "Alternative Visions," 83–4. The history of the socialist cooperative grocers has not been written yet.

48. Baudhuin, *Histoire économique*, 311.

49. For example, "Vertus de la Coopération," *Bulletin mensuel*, 15 September 1894, 1.

household tools, brushes, perfume, clothing and shoes, stationery, plus coal and wood. In the interwar years, U.E. added carpets and large household devices, and in 1935 opened a tearoom. Alongside these direct sales, U.E. had contracts with *maisons agréées*, or “accepted traders,” offering special conditions to members (e.g., not only furniture, wallpaper, and musical instruments but also dentists and photographers). The organization required a growing number of staff (12 in 1890, but 960 in 1935) and increasing floor space (4,000 m<sup>2</sup> in 1914, but 18,000 m<sup>2</sup> in 1935).<sup>50</sup> U.E.’s sales system differed radically from Delhaize’s. Instead of setting up stores all over the country, U.E. had only one store of modest appearance up to 1928. The clientele could shop in this store or order goods to be delivered at home. Opening more points of sale had been discussed prior to 1914, but the substantial financial investment prevented setting-up more stores.<sup>51</sup> In 1926, however, administrators decided to reorganize the sales system, and by 1939 U.E. possessed twenty-two *comptoirs de vente* (outlets) in the Brussels conurbation, as well as in some neighboring boroughs. Together with opening new outlets from 1928 onward, the retailer’s views became more modern: its 1936 anniversary brochure emphasized speed, hygiene, comfort, and price.<sup>52</sup>

Food accounted for the largest part of U.E. total sales, representing, for example, 62 percent in 1912.<sup>53</sup> Eight separate administrative units ran the food division, among which the buyers’ office was the most important. Its task was to select and test products. The 1936 brochure explicitly mentioned that “this office largely uses competition [between producers] to obtain the best products at the lowest price.”<sup>54</sup> In aiming at lower costs and selling prices, U.E. developed hardly any of its own factories, in contrast to Delhaize. From the 1890s to 1940, U.E. had only a bakery, a coffee roasting plant, and a wine and beer bottling plant, which logically led to fewer products sold under its brand. However, U.E. also made deals with food manufacturers in order to sell its branded product, including pasta, chocolate, biscuits,

50. *Bulletin mensuel Numéro 500*, February 1936, 29 and 40.

51. “Actes du Conseil. Séance du 12 mars 1912,” *Bulletin mensuel*, 15 April 1912, 25.

52. “(. . .) in one word, a total and cohesive rationalization, as is required by the present-day commercial organization if it wants to reach its ultimate goal: supply to the consumer the goods in the best of conditions of rapidity, hygiene, ease and selling price” [our translation], *Bulletin mensuel Numéro 500*, February 1936, 30.

53. “Tableau récapitulatif,” *Bulletin mensuel*, 15 October 1912, 3.

54. *Bulletin mensuel Numéro 500*, February 1936, 54 (“Ce bureau fait un large appel à la concurrence, de façon à obtenir des marchandises les meilleures, aux prix les plus bas”).

oil, honey, and beer.<sup>55</sup> The Christian cooperative grocer Welvaart also limited its manufacturing and processing activities to coffee, spirits, the bottling of wine, vinegar, oil, lemonade, and sparkling water and preferred to conclude deals with manufacturers who produced more efficiently goods sold under the Welvaart brand.<sup>56</sup>

## Price Lists and Patiently Counting

Delhaize's *Tarif général des marchandises* ("General price list of goods") was meant for branch managers and provided the complete list of products and prices, listing every variant of products for sale.<sup>57</sup> This booklet of over 150 pages also presented guidelines for correct retailing (storing of goods, staff attitudes, etc.), along with a limited number of advertisements. The introduction to each catalog supplied general information about the store's sales principles. A weekly addition (one or two pages) carried information on price changes, special sales, and new or withdrawn products, listed without comment.<sup>58</sup>

U.E.'s price lists were published in its *Bulletin mensuel*, meant for the co-op's members, and appearing between 1892 and 1940, with a gap during and immediately after the First World War.<sup>59</sup> U.E. printed 3,000 copies prior to 1914 and an impressive 60,000 in 1935,

55. In 1913, for example, the *Bulletin mensuel* excitedly announced that a contract was signed between U.E. and an important Brussels beer producer, explaining the agreement's conditions: ingredients and production process were to be controlled, the selling price was set by the co-op, and the beer was put in bottles in the basement of U.E., which "constitue pour le coopérateur une garantie complète de qualité." The note deemed it necessary to stress the advantage of brands with regard to bulk sales: packaged goods needed less handling and therefore guaranteed better and more correct service ("Notre nouvelle branche d'exploitation," *Bulletin mensuel*, 15 May 1913, 8.).

56. Archives Welvaart. Verslag dienstjaar 1931/32, opgesteld op 21 januari 1933.

57. *Tarif général des marchandises Delhaize Frères 'Le Lion'*, Brussels (Cie. Delhaize), irregular issues between 1890–1933; available at the Archives of the Delhaize Group (Brussels).

58. Prior to 1890, there are only lists with price changes (1875) or partial lists (1884), but after 1933 the *Tarif général* is missing, and only special lists (e.g., for Christmas) have been kept. We therefore concentrate on the time span 1890 to 1933, and although we do not have price lists for each year, we consider that we have an adequate series of catalogs for the period (i.e., 1890, 1895, 1900, 1914, 1923, and 1933). Although it is incomplete, we also take the 1884 list into account in assessing the share of branded products in this period.

59. *Bulletin mensuel de la société coopérative L'Union Economique de Bruxelles*, Brussels (Union Economique), 1892–1935; available at the Brussels Royal Library (# B 1175).

containing 10 and 90 pages respectively.<sup>60</sup> Once or twice a year, the full list of products with their prices was published, and changes in the assortment and prices appeared monthly (New goods were emphasized, but discontinued ones were not mentioned.). Along with the full range of products, the *Bulletin* included the firm's general business principles and the *Résultats généraux* (i.e., the yearly data on gross sales, wage cost, net profits, etc.). This brochure gradually included more advertisements, which was emphasized in the 1936 anniversary issue,<sup>61</sup> together with extensive notes and articles about the day-to-day life of the cooperative (e.g., "Rapport du Conseil d'administration"), sales statistics, the number of members, and, from 1920 on, items on fashion, cooking, or the maintenance of furniture. Regrettably, before 1935, the price lists were not kept systematically, since they constituted a (bizarrely printed) supplement to the *Bulletin* proper. We were only able to obtain the price catalogs of 1894, 1922, 1929, and 1935. Attempts to retrieve lists from the 1900s and 1910s failed.<sup>62</sup>

We classified all foodstuffs mentioned in the price lists into twelve well-defined groups. Each product was counted as one item, taking into account all variations in weight, types, and brands. In this way, if a can of sardines, for example, was available in two different sizes, we counted two items. We distinguished nameless products from products that were mentioned with a brand name. In the following example, the first two cans of sardines are nameless, but three others have a brand name, and in all, we therefore count five items: *Sardines aux tomates la boîte 1/4*, *Sardines Russes grand bocal*, *Sardines à l'huile d'olive "Labour" 1/4*, *Sardines Saint-Louis 1/8*, *Sardines Saint-Louis 1/4*. Note that *Sardines Russes* are not considered to have a brand name: geographical references are not brands, and we therefore regard foodstuffs with geographical references (e.g., *prunes de Bosnie*, *Châteauneuf du Pape*, or *fromage de Gouda*) as regional but unbranded products.

### Swiftly Expanding Assortments

Between the 1890s and the 1930s, both Delhaize and U.E. showed a sharp increase in the variety of food products for sale (figure 1). In the case of Delhaize, the First World War and the 1930s crisis had a

60. *Bulletin mensuel Numéro 500*, February 1936, 12–14.

61. *Bulletin mensuel. Numéro 500*, February 1936, 12 and 15.

62. For U.E. no archives are available.

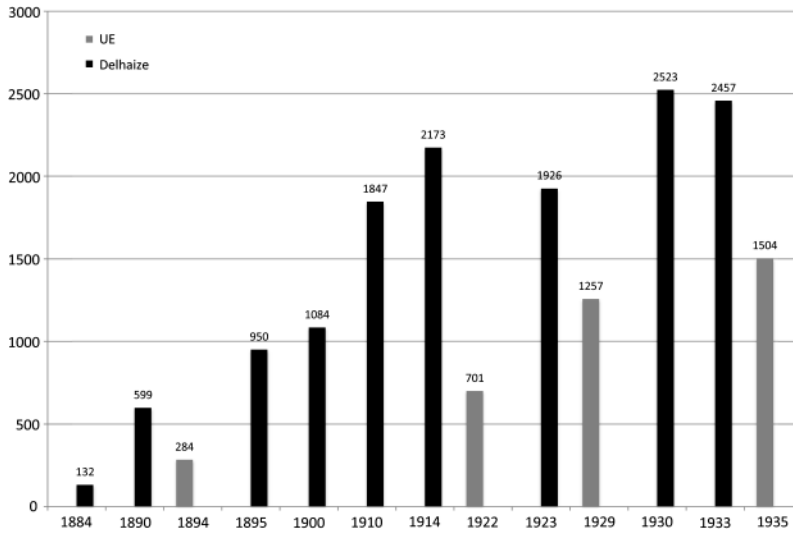


Figure 1 Evolution of the assortment of foodstuffs with Delhaize and UE (actual number of food items for sale).

Source: *Tarif général des marchandises* and *Bulletin mensuel de la société coopérative l'Union Economique de Bruxelles*; see too tables 2 and 3.

negative effect on its product range (a yearly decrease by 1.3 and 0.9 percent respectively). The fact that U.E.'s assortment continued to expand between 1929 and 1935 (+3 percent per year) may mirror the specific clientele of this cooperative (i.e., civil servants whose purchasing power did not decline during the depression). Overall, the Delhaize customers had more choice than the members of the cooperative, but the difference between the two narrowed. Although in 1894/1895, U.E. provided only 30 percent of Delhaize's range, it stocked the equivalent of 61 percent of Delhaize's items in the middle 1930s. For the whole period between 1894/1895 and 1933/1935, U.E.'s growth rate in its range of foodstuffs was 4.1 percent per year, whereas Delhaize's growth rate was only 2.5 percent.<sup>63</sup> The fact remains, however, that Delhaize was a far bigger store and that its customers were spread over the entire Belgian kingdom, including both city dwellers and inhabitants of remote, small villages. Undoubtedly, this was an incentive to diversify continuously its shops' product variety, addressing both well-off and more modest clientele.

63. Between 1894 and the early 1920s, U.E. expanded its assortment at a very high speed (+ 8.70 percent per year), whereas in the same period Delhaize's growth rate reached 3.93 percent per year. Prior to 1914, Delhaize's data show the rapid expansion of foodstuffs for sale, with an impressive annual growth rate of 28 percent in the founder years 1880s, 6.1 percent in the 1890s, and 5.1 percent in the 1900s. Such rates were not achieved during the interwar years.

Table 1 Share of four product groups in total foodstuffs for sale, Delhaize and U.E., in three periods (in percent; last row: actual number of foodstuffs)

	1894	1895	1922	1923	1933	1935
	U.E.	Delhaize	U.E.	Delhaize	Delhaize	U.E.
Sweets	28,1	37,8	32,9	27,4	28,4	29,8
Alcohol	24,6	17,2	20,0	17,2	18,5	18,1
Cans	13,3	15,1	12,5	24,6	20,4	15,2
Coffee, etc.	7,4	5,1	5,7	5,1	4,4	3,4
Rest	26,4	24,6	28,8	25,7	28,2	33,4
Total	284	950	701	1,926	2,457	1,504

Note: *Tarif général des marchandises* and *Bulletin mensuel de la société coopérative l'Union Economique de Bruxelles*.

Despite the difference in size, both retailers provided more or less the same types of goods when expanding their food range (table 1). Four categories prevailed: alcoholic drinks (wine, beer, champagne, and spirits), canned goods (meat, milk, fruit, vegetables, and fish), sweets (candy, chocolate, sugar, honey, biscuits, jams, etc.), and, to a lesser extent, raw materials for hot beverages (coffee, chicory, tea, and cocoa). Between 1895 and 1935, the proportion of these four product groups together covered roughly 70 percent of all foodstuffs appearing in the catalogs, with a decline from 75 percent in 1894/1895 to somewhat less than 70 percent in 1933/1935. In absolute terms, the product range covered by the four categories grew impressively, with sweets at U.E., for example, available in 448 different varieties in 1935, or cans at Delhaize including 502 varieties in 1933 (versus 80 and 144 respectively in 1894/1895).

Although sweets accounted for the largest segment of products at both stores for the whole period, Delhaize's share was much higher than U.E.'s before 1914. This shifted after the First World War. Owning factories, Delhaize's practice with chocolate and biscuit manufacturing, may have played a role prior to 1914, but was of no importance after the war. Delhaize's factories had some difficulties then, but U.E. sharply increased its sweets assortment; for example, candy varieties rose by 9.2 percent per year between 1922 and 1935. Obviously, chocolate, biscuits, sugar, candy, and the like contributed substantially to the increasing range of foodstuffs during this period. This growth reflected rising expenditures on sweets, as working-class budgets have noted.<sup>64</sup>

U.E.'s range of alcoholic drinks was, relatively speaking, greater than Delhaize's, with a significantly higher proportion in 1894/1895,

64. Illustrated, for example, by the case of chocolate: Scholliers, "From elite consumption."

but the gap shrank in the 1920s, reaching parity in the 1930s. The presence of alcoholic drinks in a consumer cooperative was not a self-evident outcome. John Walton observes that even in the 1950s, the sale of alcohol was a source of conflict in some English cooperatives, because it ran counter to the temperance ethic. Consequently, some of the largest English cooperatives refrained from selling alcohol.<sup>65</sup> In France, on the other hand, the selling of inexpensive wine did not seem to be an issue.<sup>66</sup> Wine was a basic ingredient of the everyday French diet, but this was hardly the case in Belgium. In any event, neither temperance issues nor working-class consumer habits prevented U.E. from bottling and selling wine, as did the Christian consumer cooperative Welvaart. Some clients of both cooperatives, though, belonged to the middle class: higher ranking civil servants at U.E., farmers for Welvaart. The range of spirits on offer at U.E. expanded quickly, offering an increasingly sophisticated assortment from all corners of the world (in absolute terms: thirty-six varieties of spirits in 1894, but 180 in 1935, i.e., a five-fold multiple). At Delhaize in the same period, the increase was more modest (2.5 times), although in absolute terms the range was higher than at U.E., reaching 297 types of liquor in 1933 as against 120 in 1895. This increase may come as a surprise, given the falling per capita consumption of spirits in Belgium, ca. 1900–1950 (–4.7 percent per year for *alcool de bouche*),<sup>67</sup> which featured a very rapid decline in consumer expenditure on alcohol in the 1930s.<sup>68</sup> Indeed, the range of beers in both Delhaize and U.E. was considerably lower than that of wine or even champagne, which may be explained by the presence of many local brewers.

Delhaize paid more attention to canned goods than U.E., particularly in the early 1920s (neither Delhaize nor U.E. possessed a canning factory). Vegetables occupied by far the largest segment of this subgroup at both retailers throughout the whole period, reaching 50 percent of all cans offered for sale. Peas were particularly popular (for example, the 1932 U.E. price list included *petits pois sur-extra fins*, *petits pois extra fins*, *petits pois très fins*, *petits pois fins*, *petits pois mi-fins*, *petits pois moyens*). In 1935, U.E. sold 105 varieties of canned vegetables (in 1894, 19), and Delhaize 237 sorts (in 1895, 64). This rapid expansion may be derived from Belgium's many new factories for canning vegetables during this period.<sup>69</sup> The proportion

65. Walton, "Post-war Decline," 18–19.

66. Defoort, *Werklieden*, 351.

67. Reuss, "L'évolution de la consommation de boissons alcoolisées," 90.

68. Schroeven, *Consumer Expenditure*, 94–9 and 250–1.

69. Segers and Van Molle, *Leven van het land*, 76–7.



of canned fruit remained fairly stable in both retailers, but that of meats declined. Canned fish, on the other hand, increased a great deal, both in absolute terms and proportionally. In the 1930s, Delhaize had an assortment of 167 types (25 in 1895) and U.E. 87 (only 8 in 1894). Here, sardines appeared to be very successful, for example, *sardines russes, sans arêtes, à l'huile d'olive, à la tomate, sans peau, fumées*, etc., and of diverse forms and weights, but fancy and expensive products joined the assortment as well (salmon, crayfish, and the like). The breakthrough of canned foods showed up clearly in the national budget enquiry of 1928–1929, in which for the first time *conserves alimentaires* were mentioned separately: all households consumed cans of vegetables, fish, and fruit, but white-collar workers bought nearly double the quantity blue-collar families consumed.<sup>70</sup>

Finally, coffee and chicory made up two-thirds of the coffee subgroup. It is no surprise that these were markedly present throughout the whole period, since they were the most popular hot drinks in Belgium. Moreover, both retailers possessed coffee-roasting facilities. U.E. sold seven varieties of coffee in 1894 and thirteen in 1935. Delhaize was more expansive, with twenty-four sorts of coffee in 1895 and thirty-four in 1933. In both cases, product diversification was limited, which led to the decreasing share of this subgroup in the total assortment of food at both retailers. Remarkably for Belgium, a country with very moderate tea consumption, the range of teas grew strongly (for example, Delhaize had six sorts of tea in 1895, but thirty-four in 1933). This expansion surpassed by far the modestly rising tea consumption in Belgium from the 1920s on.<sup>71</sup>

### Unbranded, Branded, and Own Branded

Figures 2a and 2b give a general outline of the proliferation of branded products at both retailers, making clear that brands were secondary in the 1890s, becoming the norm in the 1930s. Both retailers followed a similar path, although differences were apparent. While in 1884 no less than 93.2 percent of Delhaize's products were unbranded, in 1933 only 16.8 percent remained so (table 2). In the 1894 U.E. range on offer, 67.6 percent of products were unbranded while in 1935 only 27.7 percent remained so (table 3). At Delhaize, both the First World War and the crisis of the 1930s led to a decrease of unbranded products in the product range; the overall reduction in Delhaize's

70. Julin, "Résultats principaux," 529 and 534.

71. Schroeven, *Consumer Expenditure*, 81.

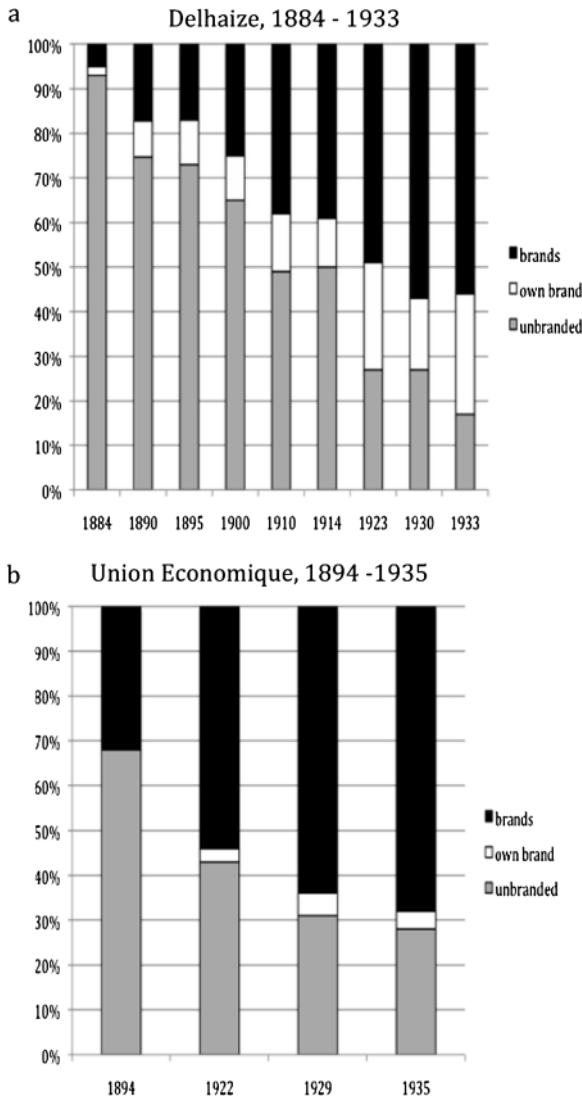


Figure 2 Share of unbranded goods, own brand, and brands (in percent) of total food items for sale at Delhaize and U.E. (a) Delhaize, 1884–1933.

Source: based on table 2. (b) U.E., 1894–1935. Source: based on table 3.

offerings in these years largely derived from discontinuing unbranded goods (1,090 in 1914, but only 523 in 1923, and 688 in 1930 but 414 in 1933). U.E. did not go through a stage of reducing its range of unbranded foodstuffs in the early 1930s, although the growth rate of unbranded foodstuffs slowed down.

About 70 percent of Delhaize's branded items were manufacturers' labels, and in the case of U.E. the equivalent figure was more than 90

Table 2 Delhaize: number of branded goods, own brand, and nameless items, 1884–1933

	1884	1890	1895	1900	1910	1914	1923	1930	1933
Brands	7	105	162	276	698	841	939	1,446	1,369
Delhaize	2	49	91	107	241	242	464	389	674
Unbranded	123	445	697	701	908	1,090	523	688	414
Total	132	599	950	1,084	1,847	2,173	1,926	2,523	2,457

Note: *Tarif général des marchandises.*

Table 3 U.E.: number of branded goods, own brand, and nameless items, 1894–1935

	1894	1922	1929	1935
Brands	92	379	800	1026
U.E.	0	22	60	61
Unbranded	192	300	397	417
Total	284	701	1,257	1,504

Note: *Bulletin mensuel de la société coopérative l'Union Economique de Bruxelles.*

percent. All in all, the ratio of proprietary brands to the retailer's own label remained fairly stable throughout the period under investigation (figure 3). At U.E., own-branded foodstuffs represented a poor 5–7 percent of all branded foods, but at Delhaize, with many more factories, fluctuations were more pronounced. From 1884 to 1895, the share of Delhaize's own brands rose swiftly (from 22 to 36 percent), but declined to 22 percent in 1914. After the First World War, the share of proprietary labels in the total number of brands decreased, and Delhaize's own brands rose in importance (from 22 to 33 percent). This occurred during the 1930s crisis, when the absolute number of branded food products declined for the first time. It may be suggested that, after having established factories in the 1880s and 1890s and having promoted its own brands, Delhaize had to give way to proprietary brands in times of economic boom (the 1900s and the 1920s, to which Figure 4 testifies), whereas the Delhaize brand came more into its own in times of economic downturn.

Of course, own brands appeared only in particular product groups, for which Delhaize and U.E. possessed factories or had agreements with producers. Up to 1900, U.E. had no own brands, but little by little the cooperative decided to initiate them. For example, in 1913 a range of *Pâtes alimentaires U.E.* were launched, “which could

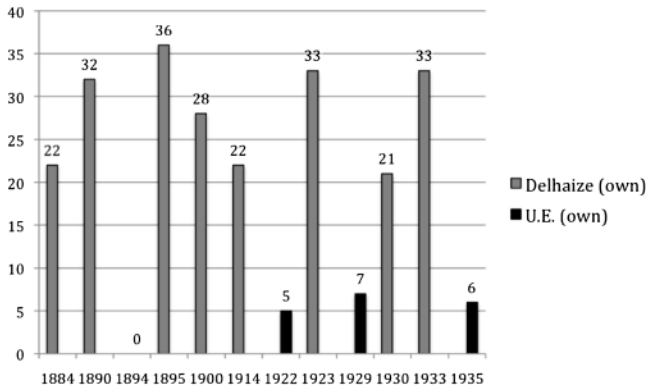


Figure 3 Share of own brand (in %) of total branded food items for sale at Delhaize and U.E.

Source: based on tables 2 and 3.

compete with the best known brands.”<sup>72</sup> By 1914, U.E. had fifty-three own-brand products. However, despite owning a coffee-roasting and grinding plant, its price lists did not mention the U.E. brand name: coffee appeared to be sold as an unbranded item, with varieties designated as “*Mélange A*,” “*Mélange B*,” “*Mélange C*,” and “*Mélange D*.” U.E. clearly missed an opportunity to associate its name with a product it was proud of (did the fact that the coffee was sold at U.E. suffice to guarantee its quality?). Delhaize’s own brand was markedly present in coffee and sweets, with own brand sweets (chocolate, biscuits, candy, and the like) rising after the World War to as high as 81 percent of all the branded products on sale in this segment.<sup>73</sup>

Delhaize’s and U.E.’s documentation does not reveal why they both refrained from setting up their own canning factories, or why they failed to conclude agreements with third parties. Establishing a canning factory from scratch was quite costly.<sup>74</sup> However, subcontracting to a

72. “Epicerie. Pâtes alimentaires U.E.,” *Bulletin Mensuel*, 15 November 1913, 15 (“peuvent rivaliser avec les marques les plus connues”).

73. Delhaize: share of own brand in total brand names (in percent), four product groups

	1895	1914	1933
Alcoholic drinks	0	4	12
Coffee etc.	66	47	43
Canned goods	5	5	5
Sweets	55	63	81

Source: *Tarif général des marchandises Delhaize Frères ‘Le Lion’*.

74. Segers and Van Molle, *Leven van het land*, 77 ff.



Figure 4 Window of a Delhaize shop (unknown location), 1922, built to participate in a *concours d'étalage* (window contest). Take note of the big advertisements for branded products on the left of the window.

Source : Archives Delhaize (Brussels).

producer was viable, and Delhaize and U.E. did show an interest in own-branded cans (both retailers had some of these, such as “Ananas entier Le Lion,” or “Extrait de viande Delhaize”). Were manufacturers reluctant to sell cans under another brand name than their own? Did consumers prefer the by then familiar brands of cans?

The fact that proprietary labels were more prominent in U.E.’s range than in Delhaize’s is remarkable. One would expect a cooperative to rely less on proprietary brands than a chain store, emphasizing the cooperative’s own brand. Stefan Schwarzkopf observes how British cooperatives proudly advertised the qualities of their cooperatively produced merchandise.<sup>75</sup> At times, U.E. did in fact promote its own brand. In June 1914, a special note in the *Bulletin mensuel* emphasized U.E.-branded goods for sale: ten alcoholic drinks, seven biscuits, five types of chocolate, five types of pasta, four varieties of coffee, and so on, totaling fifty-three products.<sup>76</sup> This note stressed that these were foodstuffs that benefited from a special status granted by U.E. in terms of quality, control and price, and which were perfectly able to compete with proprietary labels. Moreover, U.E. products were generally cheaper because of bulk buying that led to advantageous conditions

75. Schwarzkopf, “Innovation, Modernization, Consumerism,” 199.

76. “Epicerie,” *Bulletin mensuel*, 15 June 1914, 34.



Figure 5 An example of the very plain advertisement style that appeared in U.E.'s *Bulletin Mensuel* (October 1939, 87). The text at the bottom reads, "Their excellent quality and matchless price make this a product with increasing success among the cooperators who are genuine connoisseurs and aware of their interests".

(characterized as *notre puissance d'achat* or "our purchasing power"). On the other hand, U.E. processed its own coffee, but usually refrained from advertising it as such: it was sold as an "anonymous" item. The publicity for the own brand in the *Bulletin mensuel* was also rather plain and even amateurish (see Figure 5). One has the impression that U.E. was aware of the difficulty of competing with manufacturer's brands and consequently limited its efforts in this respect.

It is therefore no surprise that the overwhelming majority of branded products on the U.E. shelves were manufacturers' labels, for which the *Bulletin mensuel* published many advertisements. The editors even got quite excited when they were able to announce the arrival of cans or chocolate from a well-known brand. In fact, the brand name seemed more important than the type of product. In 1912, for example, it was announced in the *Bulletin mensuel*, "We were able to buy a few boxes of cans of MARIE THUMAS, which we will sell,"<sup>77</sup> rather than mentioning which sorts of canned fruit, vegetable, fish, or meat were for sale.

As U.E. mentioned in its *Bulletin*, the cooperative was under pressure from customers to sell a wide range of proprietary brands.

77. "Nous avons pu acheter quelques caisses de conserves MARIE THUMAS que nous mettons en vente": "Épicerie. Articles nouveaux," *Bulletin mensuel*, 15 January 1912, 15.

U.E. tended to criticize the intensive advertising with which the manufacturers of branded products seduced the public, since the popularity of brand products enabled manufacturers to impose a fixed resale price, despite the fact that the practice of RPM was allegedly not widespread in Belgium. "In this respect the public procures them a support that is to be deplored," U.E. complained.<sup>78</sup> An example of power relations appeared in the *Bulletin mensuel* of June 1913: "Knorr products. Kleist wholesalers invite us to sell the Knorr products at current retail prices. Our customers will find the new price in the present Bulletin."<sup>79</sup> Apparently, U.E. had been vending these products at a lower price than required by Kleist or Knorr. In 1920, the *Bulletin* observed that manufacturers and importers of branded products were increasingly imposing compulsory prices.<sup>80</sup> The cooperative had no choice: refusing to sell at the *prix imposé* (i.e., prices imposed by wholesalers or manufacturers) meant that the brand would no longer be available at U.E., which in the capital's very competitive environment could yield a loss of custom.<sup>81</sup> In the 1930s, U.E. seems to have become resigned: it recorded dryly that brands were inevitable and, moreover, that publicity was continuously becoming more sophisticated.<sup>82</sup> Price lists codified U.E.'s total acceptance of brands, by firstly classifying the food items for sale according to product group (for instance, *confitures*, or jams), and then by very noticeable brand name: Confilux, Cross & Blackwell, Lamby, and Lenzbourg. The 1894 list mentioned only the fruits in the jam, and no brands. Similarly, in the 1930s chocolate appeared alphabetically by brand name instead of by type. In the mid-1920s, the Christian cooperative grocer, Welvaart, complained about "the trusts and cartels of some large producers."<sup>83</sup> However, a few years later the same cooperative conceded that it stocked branded products when the customer required them.<sup>84</sup>

78. "Le public leur procure sous ce rapport une aide déplorable," "Note sur le commerce de détail," *Bulletin mensuel*, 15 December 1920, 3.

79. "Produits Knorr. La maison Kleist nous invite à vendre les produits Knorr aux prix du commerce. Nos clients trouveront donc les nouveaux prix dans le présent Bulletin," "Epicerie," *Bulletin mensuel*, 15 June 1913, 15.

80. "Note sur le commerce de détail," *Bulletin mensuel*, 15 December 1920, 3.

81. "Prix imposés. Remarques commerciales," *Bulletin mensuel*, 15 April 1925, 3.

82. "Son Bulletin mensuel," *Bulletin mensuel*. Numéro 500, February 1936, 12, "(...) au début, une seule (page) est réservée aux annonces des maisons agréés. Cependant, à mesure que la confiance renaît et que la reprise des affaires s'accroît, la partie officielle devient moins importante, pour faire plus large place à la publicité payante."

83. Archives Welvaart, Verslag over het dienstjaar 1925, opgesteld op 27 maart 1926.

84. Archives Welvaart, Verslag over het dienstjaar 1931/32, opgesteld op 21 januari 1933.



Evidently, cooperatives had no choice but to satisfy their customers' demand for brand products.

Managers and shopkeepers at Delhaize undoubtedly confronted a similar problem: stuck between the customers' requests and the manufacturers' and importers' requirements. In contrast with U.E., however, Delhaize was more effective in promoting its own brand. By and large "Delhaize" was used the most, but the retailer had alternative brand names too, such as "Le Lion" (e.g., margarine or spirits), "Prince de Valois" (sparkling wine) and, in the 1930s, "Derby." Delhaize's success was due in part to its vertical integration, much more developed than U.E.'s. Delhaize could rely on a wide network of production facilities. This could be a liability if these factories were unable to compete with major branded products. We argue that Delhaize proved capable of marketing its goods as genuine brand items. As Belgium's oldest and biggest grocer, with nationwide coverage and an imaginative use of publicity and window display,<sup>85</sup> Delhaize succeeded in promoting the store itself as a strong brand, mirroring the achievement of Chicago's Marshall Field.<sup>86</sup> Even "Derby," the discount version of the Delhaize brand introduced in the 1930s to compete with the burgeoning dime stores, was attractively presented and advertised.<sup>87</sup> Like chain stores abroad, Delhaize thus countered independent manufacturers' pressure to impose resale prices by successfully promoting its own brand. Compared to Delhaize's practices, the U.E.'s presentation was dull and austere. Moreover, U.E. points of sale were closed premises without any window displays.

The rise of brands was not substantial or consistent across all groups of products. [Tables 4](#) and [5](#) show the proportion of brands at Delhaize and U.E., broken down by twelve product groups (data include proprietary as well as own brands). On some shelves in both stores, branded products hardly appeared at all throughout the whole period, for example, dried food and fresh and salt-cured meat.

However, for all other foodstuffs, the brand name continued to progress. In 1884, Delhaize's price list included seven branded food items (including Liebig's meat stock), and six years later, the chain store had 154 brand name products, particularly in the subgroups of sweets, cans, dairy, and spices/sauces ([table 4](#)). In 1895, the group of

85. Teughels, "Marketing Food," 224–32.

86. Koehn, *Brand New*, 92 and 115–18.

87. Collet, *Delhaize "Le Lion,"* 76–7.

Table 4 Delhaize: share of brands<sup>a</sup> per product group, in total number of products (in percent), 1890–1933

	1890	1895	1900	1914	1923	1933
Alcohol	13	20	26	45	61	72
Nonalcohol	0	19	77	77	42	100
Coffee, etc.	7	49	52	38	88	100
Cans	24	27	66	75	82	99
Cereals	0	0	32	90	77	100
Pasta/rice	0	7	7	32	81	75
Dried food	2	2	6	8	4	26
Sweets	51	33	34	50	89	88
Dairy	47	21	20	18	53	67
Spices/sauces	21	45	36	44	58	91
Meats	0	0	0	0	61	20
Miscellanea	0	0	0	0	83	87
Total	26	27	35	50	73	83

<sup>a</sup>All brands, Delhaize included.Note: *Tarif général des marchandises*.Table 5 U.E.: share of brands<sup>a</sup> per product group, in total number of products (in percent), 1894–1935

	1894	1922	1929	1935
Alcohol	41	54	56	62
Nonalcohol	0	17	61	58
Coffee, etc.	43	70	78	53
Cans	21	65	86	93
Cereals	0	37	55	89
Pasta/rice	0	55	45	53
Dried food	0	0	6	19
Sweets	50	76	80	84
Dairy	0	26	60	63
Spices/sauces	20	52	76	82
Meats	0	0	2	9
Miscellanea	0	0	100	100
Total	32	57	68	72

<sup>a</sup>All brands, U.E. included.Note: *Bulletin mensuel de la société coopérative l'Union Economique de Bruxelles*.

coffee, tea, and chicory joined these categories. Apart from alcoholic drinks, these five formed the bulk of Delhaize's supply of food items. By then, considering the total assortment on offer, brands must have been very visible on the shelves with spices and sauces (Cross & Blackwell, Bovril, Knorr, . . .), sweets (Suchard, Menier, Delacre, . . .), and cans (Saupiquet, Fairbank, . . .). At the same moment, U.E.'s shelves presented a fairly similar picture (table 5), with a high proportion of brands in sweets, spices and sauces, cans, and the group

of coffee and similar. Generally, the same brands appeared at U.E. However, U.E.'s assortment of alcoholic drinks contained a higher proportion of branded products than Delhaize's because of the abundant range of spirits and champagne.

Between 1895 and 1914, Delhaize added four new product groups characterized by a relatively high incidence of brand names: nonalcoholic drinks (mineral water, like Evian, Vittel, or Koningsbronnen), cereals (Remy, Knorr, or L'Etoile), alcoholic drinks, and pasta (La Lyonnaise or Rivoire & Carret). Particularly, the brand-name breakthrough in nonalcoholic drinks in 1900, that of cereals in 1914 and of alcoholic drinks in the same year was impressive. By 1914 at Delhaize, four product groups (nonalcoholic drinks, canned goods, cereals, and sweets) accounted for more than 50 percent of branded food items, and in four other groups (alcoholic drinks, spices and sauces, coffee-tea-chicory, and pasta) branded products accounted for between 32 and 45 percent, with the remaining three product groups (dried foods, meats, and miscellanea) having no or few branded items.

In general, this development continued after the World War with a fast and irreversible increase of brand names, especially in those generating major revenues for both retailers (i.e., alcoholic drinks, sweets, and canned foods). By 1933/1935, some product groups included *only* branded goods for sale (at Delhaize: nonalcoholic drinks, coffee, cans, cereals, and spices). Yet occasionally branded foods' share in some product groups declined. This occurred with pasta/rice at U.E. in 1929, due to a sudden expansion of unbranded vermicelli, macaroni and the like: between 1922 and 1929, the total number of pasta products rose from twelve to twenty one, with only two new branded products added. At U.E. in 1935, the share of branded goods in the coffee group fell significantly, from 78 to 53 percent. Here, the number of brand names for coffee, chicory and, especially, tea declined, the latter from fifteen types in 1929 to ten in 1935, whereas the number of unbranded goods doubled from twelve to twenty-four. In some cases, simply "Tilleul" (linden) or "Camomille" (chamomile) were mentioned, in other cases a geographical reference was added (for instance, "China Souchong"). The fact that unbranded products were added indicates that branding had not become imperative in the 1920s and 1930s.

A comparison of the branded products in the price lists of both retailers shows that, in the 1930s, each specialized in particular brands, although some brands were on sale at both stores. For example, in 1932 U.E. sold three labels of canned vegetables (L'Abeille, La Corbeille, and Marie Thumas), but Delhaize had nine (including La Corbeille and Marie Thumas, alongside Panier d'Or, Soleil, Cirio,

Trois Etoiles, and others). Similarly, U.E. sold nine different companies' biscuits (De Beukelaer, Parein, Weiler, etc.) and Delhaize ten (with De Beukelaer as the only common brand, alongside Delhaize, Huntley & Palmers, Heudebert, etc.). These examples can be multiplied. It is striking that U.E. supplied quite a different assortment of brands than Delhaize. Would U.E., with its activity limited to the capital, have covered a more luxurious range than Delhaize? The latter aimed at all segments of the market in its price setting<sup>88</sup>, but what about U.E.? Comparison between the prices of specific products in the two stores does not lead us to conclude that U.E. systematically provided more expensive brands than Delhaize did. Except for chocolate, however, where the average price was 19.4 francs per kilo at U.E., but only 15.2 francs at Delhaize (which sold huge quantities of its own brand). This was also true for oil (an average price of 8.5 francs per liter at U.E. and 8.0 francs at Delhaize) and sugar (respectively, 3.7 and 2.1 francs, a considerable difference). However, pasta cost more at Delhaize than at U.E. (respectively 6.8 and 5.4 francs), as did coffee (20.2 and 18.6 francs), although both retailers had their own brands. This comparison, therefore, does not lead to a clear picture. As to those brands that appeared in both stores, were these successful products that had become *unavoidable*?

## Conclusions

Entering a Delhaize or U.E. store in 1940 was quite a different experience from visiting one in 1890. Apart from the stores' layout, the vastly increased assortment of goods made a big difference. Moreover, most foodstuffs were prepackaged, nicely arranged and, above all, recognizable because of their branding. Since both Delhaize and U.E. were major actors, we conclude that by 1940 most consumers in Belgium, urban or countryside, working class or bourgeois, men or women, were fully accustomed to brands. What is more, U.E.'s and Delhaize's clientele had become familiar with brands by the 1890s, when they appeared rapidly in alcoholic drinks, canned foods, and sweets.

Customers may have appreciated the greater range of canned sardines or chocolate, but they may have wondered about the ever-growing range of alcohol products, because overall consumption of spirits was falling sharply and that of wine grew only very moderately.

88. Van den Eeckhout and Scholliers, "The Belgian Multiple Food Retailer," 95.

The same occurred with tea: hardly consumed in Belgium, the range available was growing at both retailers. This paradox may refer to the shopper's craving for choice and, similarly, to the retailer's wish to reach as many customers as possible within a restricted market segment. Yet, the growth of product variety and branding did not occur in a linear way. Both were influenced by general economic conditions, as demonstrated by Delhaize's shrinking product range in the early 1920s and the 1930 crisis, as well as by the rapid expansion of variety and brands in the booming 1900s and late 1920s. In this respect, general economic conditions (real wage trends, unemployment) seemed to have had less effect on the proliferation of brands at U.E. than at Delhaize, which appealed to a much more diverse clientele.

Food retailing in this period was very much a story of distribution of brands, although not all products were branded. U.E.'s coffee, for example, while roasted at the cooperative's own modern plant, was not systematically sold with a brand name. Similarly, in the 1920s U.E. added several unbranded pastas. A widening product range in those years, therefore, did not automatically imply an increase in brand names. Besides, some product lines remained very much outside branding, such as dried fruits or nuts. The above innovations were underscored by various developments linked to changes in the entire food system, that is, larger supply of agricultural products, massive manufacturing of food in industrial plants, the growing influence of mediators (women's magazines, advertising, food recommendations, and the like), and increasing and innovative demand.

The success of branded food items was the work of proprietary brands in the first instance: overall, about 70 percent of Delhaize's branded items were manufacturers' labels, more than 90 percent at U.E. Although the cooperative mistrusted brands, because they allegedly inflated prices and seduced consumers, it could not resist their rise, since customers wanted them. In contrast to Delhaize, U.E. was unable to counter the growing impact of proprietary brands by promoting its own brand products. In that respect, a more developed vertical integration, contracts with manufacturers and importers, and a creative and imaginative advertising policy promoting the house brand, was more valuable than an ideological distrust of brands. Overall, from 1890 onwards, both retailers contributed forcefully to the upsurge of product choice and brands, which twenty years later had become *the* essential feature of modern consumption.

While there was hardly any doubt that between the 1860s and the 1930s, Western European and American consumers were offered an increasing variation in grocery items and could choose from a widening range of branded products, research so far has failed to back

up these assertions with precise, quantified information regarding the timing and the impact of this process. This essay aims to fill that gap in part, although we are aware that similar research on the grocery trade of other countries is required in order to formulate more general conclusions. Decisive factors in the emergence of diverging itineraries will most certainly be the composition of the shops' clienteles and the strength of vertical integration. The fact that both the multiple grocer Delhaize and the cooperative U.E. catered for a mixed clientele of middle-class and working-class customers undoubtedly stimulated product variety and the presence of branded items. The impact of proprietary brands, on the other hand, will depend on the store's capability to promote its private label as a genuine brand item. In the latter case, the name of the store itself becomes the brand.

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